

Quality Review Board Charter

Team Name: Editorial Services Quality Review Board (QRB)

Shared and Meaningful Purpose

Purpose:

To develop cooperatively a set of performance standards--keyed to the three Student financial Assistance performance standards of customer satisfaction, employee satisfaction, and reduced unit cost--for evaluating the quality of each of the tasks within the Editorial Services Contract (ESC).

To model behaviors that demonstrate mutual cooperation, and encourage continuous improvement.

To develop an incentive structure, based on the performance standards, for tasks One, Two, and Three of the ESC.

Why now?

The ESC is one of four contracts that have been radically changed in response to a two-part charge from the Chief Operating Officer of Student Financial Assistance (SFA). The first part of the charge related to Work Statements and performance measures: representatives of all parties involved in the contracts would develop new, greatly simplified Work Statements that were based on performance rather than process, and would develop performance measures built around the SFA balanced scorecard of Increased Customer Satisfaction, Increased Employee Satisfaction, and Lower Unit Cost.

The second part of the charge called for a revolutionary change in the nature of the contract relationship: all parties would consider themselves on the same side, united in a common enterprise. Mutual trust would be the foundation of the relationship. "Cards on the table" became the unofficial motto of the ESC group, whose membership included staff from Student Aid Awareness, NCS Pearson, and Contracts and Acquisitions.

The ESC group has dramatically changed the ESC Work Statement and included a Statement of Values. All parties concerned, including Student Aid Awareness staff, NCS Pearson staff, the General Manager of the Students Channel, the Director of SFA Contracts and Acquisitions, and the NCS Pearson Vice President, Postsecondary Solutions, have signed.

Implementing the new Work Statement will be the first task of the Quality Review Board (QRB) which consists of co-leaders from SFA and NCS Pearson, and members from NCS Pearson and SFA.

Institutionalizing the spirit of partnership and trust will be its continuing task.

Vision of Success:

The ESC is viewed as a model of success as an SFA performance-based contract.

Guiding Principles for the Year 2001:

- Be worthy of trust, follow through on commitments, share information.
- Think out of the box; be open-minded.
- Continuously focus on the customer.
- Look for mutual rewards.
- Listen respectfully to each other.
- Accept responsibility.
- Be cooperative and willing to negotiate.
- Be willing to compromise; be flexible; stress teamwork.
- Create a "no bad news" environment.

Specific and Challenging Goals

Topic: Implement each of the five tasks in the ESC Work Statement

Performance Indicator:

Goals:

The QRB develops an initial set of written performance standards for controlled correspondence within one month.

The QRB develops a set of written performance standards for non-controlled correspondence within six weeks.

The QRB develops a written incentive structure for controlled and non- of "kitchen cabinet" (sponsor panel) to coordinate activities before QRB is controlled correspondence based on the performance standards, within eight weeks.

The QRB develops a statement of its own continuing role in the operation of the ESC within 12 weeks.

The QRB agrees on a plan for a significant expansion of e-mail and other electronic services within twelve weeks.

Future Purpose: See Work Statement

Special Conditions, Constraints, or Requirements: See Work Statement

Clear Roles

Sponsor

Jennifer Douglas

Team Leaders;

Bill Ryan

Melissa Cantrell

Core Team Members: QRB members will vary. Current members are Paula Leonard (NCS Pearson), Carolyn Dickens and Tony Williams (Acquisitions and Contract Performance), and Cheryl Tisdale, Cindy Cameron, and Marianella Garcia (Student Aid Awareness).

Advisory members: For implementing the work statement, the groups that would “normally” be advisory members (NCS Pearson; Acquisitions and Contract Performance) have been folded into the QRB.

For implementing new tasks, advisory members would be drawn from organizations affected by the new task. For example, if the QRB decided to pilot a project that involved responding to Congressional correspondence by e-mail rather than paper, the advisory members would be a member of ED’s Executive Secretariat and/or the Office of Legislation (the OL member would most likely be Libby Upshur).

For developing a document that defines the ongoing role of the QRB, the advisory members would be senior officials from the Students Channel, Acquisitions and Contract Performance, and NCS Pearson.

Recorder/Documenter: As assigned.

Facilitators: Bill Ryan, Melissa Cantrell, and Bob Wilson.

Decision-Making: Group consensus with fallback to Bill Ryan and Melissa Cantrell.

A Common and Collaborative Approach

An agreed-upon Process Map and Work Plan: The Process Map and Work Plan should reflect the Work Statement and the dates within the Work Statement and in the “Vision of Success” section above.

Operating Agreements and Principles--how we want to work together:

The “How We Are Going to work /together” section of the Work Statement, and other relevant sections of the Work Statement, appear below.

How We Are Going To Work Together

"Macro" roles of SFA

Coordination with other ED and other federal agencies for correspondence issues

Liaison with other ED and other federal Agencies on electronic correspondence and Web-related issues

Coordination with other ED offices on survey clearances

Providing information on new policies, information, procedures, etc., relating to contract administration and SFA program administration

"Bust bureaucracy"

Ensure invoicing processes meet contractual Agreement.

"Macro" roles of NCS/Pearson

Provide feedback to SFA on correspondence volumes, "spikes," trends, and analyze data

Ensure invoicing processes meet contractual agreement

Propose innovations to increase customer satisfaction and reduce costs

Inform SFA on what we need to meet contract goals

"Bust bureaucracy"

Inform SFA when operations have been interrupted and when commitments may not be met

Addressing Disputes:

Consider the best interest of the customer; no "positional" disputes.

Recognize that regulations impose certain conditions or constraints.

3. Remember guiding principles.

4. Focus on win-win solutions.

For difficult disputes, include Contracts and Acquisitions.

Guiding Principles:

Be worthy of trust, follow through on commitments, share information.

Think out of the box; be open-minded.

Continuously focus on the customer.

Look for mutual rewards.

Listen respectfully to each other.

Accept responsibility.

Be cooperative and willing to negotiate.

Be willing to compromise; be flexible; stress teamwork.
Create a "no bad news" environment.

How often the core team (QRB) will meet and other key agreements-

Thursdays from 3:00-4:00 via conference call.

Complimentary Skills and Resources

Key stakeholders and their interests and needs:

Key stakeholders outside the QRB) are the ED Executive Secretariat, the Office of Legislation; congressional correspondents, and inquirers. Their interests and needs relate to prompt, courteous, accurate, complete, and responses to inquiries.

Competency requirements fro the team:

Knowledge of Title IV programs, of ED/SFA correspondence procedures, and of SFA's standard paragraphs, form letters, fact sheets, publications, etc.

Good writing skills

Good analytical skills

Expertise in electronic communication via the internet.

Resource requirements (time, people, money, materials)

Time dedicated to this task

Travel funds for site visits